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**Doxim CCM
Digital Communications**



In today's business environment, delivering a modern, engaging customer experience is a top priority for organizations – because it's a top priority for consumers. A great customer experience (CX) is now more important than price or product¹, and 86% of buyers will pay more for a product that delivers a great CX². On the reverse, more than half of consumers will abandon a brand when the experience is poor³.

What is the experience they're looking for?

- Mobile Friendly – Communications that are digital and mobile-first, providing a streamlined experience on the customers preferred device.
- Timely & Interactive Engagement – Communications with targeted and compelling content, enabling the customer to respond, provide input, and engage in 2-way conversations with your organization.
- On-Demand Access – Communications that can be accessed when and where the customer desires, with self-service control over account information and delivery preferences.

¹ "Customers 2020: A Progress Report", [Customers 2020: A Progress Report - Walker Information](#)

² "Experience is Everything: Here's How to Get it Right"; Price Waterhouse Coopers (PwC)

³ "37 Customer Experience Statistics you Need to Know for 2021", May 4, 2021, [37 Powerful Customer Experience Statistics to Know in 2021 \(superoffice.com\)](#)

Digital Engagement Across the Customer Journey



Doxim is an ideal partner with world-class operations, innovative technology, and a proven approach to the digital customer journey. Working together, we can engage your customers with mobile-friendly communications that offer timely and interactive engagement on-demand in the customers' preferred channel – for optimal CX and business results.

The Doxim CCM platform offers:

- Portal ePresentment - Give your customers on-demand access to digital documents (PDF, HTML) through a branded customer portal with self-serve capabilities.
- Digital Notifications & Messaging - Notify your customers by email or SMS when a statement or document is available in the customer portal and ready for viewing. Enable 2-way conversations.
- Secure Document Delivery with OTP - Provide direct access to digital documents by email or SMS. A one-time password (OTP) provides heightened security.
- Interactive Experiences – Deliver innovative experiences that simplify complex information, respond in real time to customer input, and deliver highly personalized outcomes.
- Orchestrated Email Campaigns – Send targeted email campaigns to segmented lists, with triggers and autoresponders driven by engagement behavior.

Portal ePresentation



Doxim CCM equips you with digital documents and a customer portal that is fully branded and customized to your environment – providing a one-stop shop for customers to engage with you and access their information.

- On-Demand, Self-Serve Access – Securely share digital documents with your customers through the Doxim Customer Experience Portal (CXP). Give them self-serve access to manage their account information and delivery preferences.
- Secure Document Repository – Store documents securely and compliantly in Doxim ECM – the common endpoint for documents created by Doxim. This powerful, configurable, cloud-based archive ensures documents are securely managed yet easily accessible by customers and staff alike – through the Doxim CXP, CSR Center, and other platform modules.
- Mobile-Friendly – Deliver documents in PDF or HTML format with rich information and dynamic, interactive content. Content is beautifully rendered and available anytime, anywhere on preferred digital devices.
- Accessible & Compliant with Accessibility Legislation – Ensure customer documents and customer portal communications comply with accessibility legislation (including AODA, ADA) and support customers using assistive technology.

Digital Notifications & Messaging



Today's digital CX incorporates frequent, personalized, interactive engagement and conversations. Doxim provides the latest future-facing technology for omnichannel engagement and true 2-way conversations.

- Alerts and Messages – Instantly message customers by email or SMS/text regarding account activity (e.g. 'your statement is ready') or to deliver account-level information. Enable customers to respond for instant 2-way engagement.
- 'In-Portal' Customer Service Messaging – Increase customer satisfaction and reduce call center volumes with "in portal" messaging. Rapidly respond to enquiries customers send through the customer portal "Contact Us" page or in response to a 2-way digital business message.

Interactive Experiences



Engage customers with hyper-personalized experiences and the 'personal touch' needed to motivate action.

- Interactive Documents – When a customer portal is not ideal (e.g. for one-off or infrequent engagement), you can deliver the same personalized and interactive experience by email – direct to your customers inbox. The secure, interactive experience enclosed in the email attachment accelerates paperless adoption, reduces time-to-pay, and delivers the ultimate modern CX.
- Personalized, Interactive Video – Interactive video provides the 'personal touch' needed to drive engagement, conversions, and revenue. The data-driven video follows a pre-set workflow to inject customer data, respond to customer choices, perform calculations, and deliver personalized outcomes.

Orchestrated Email Campaigns



Grow your sales and customer lifetime value (CLV) with personalized, orchestrated email marketing campaigns to segmented lists. Our easy-to-use solution provides a complete set of powerful capabilities to deploy automated, multi-step, trigger-based campaigns that respond to customer actions – strengthening customer engagement, driving loyalty, and boosting your bottom line.

And, for those with limited in-house capabilities, we offer a spectrum of support, from hourly consulting to our “white glove” outsourced service – with Doxim experts managing and optimizing email campaigns for you.

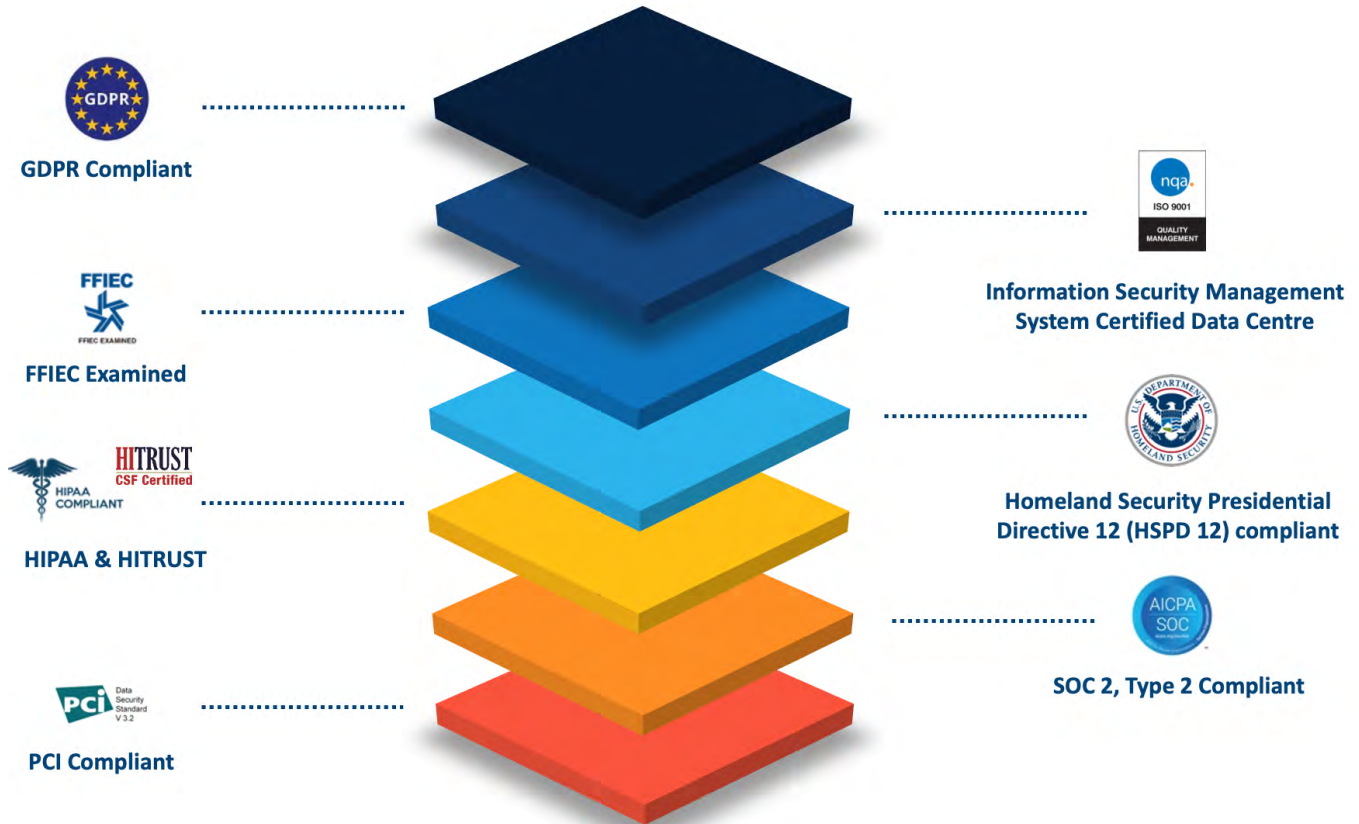
Personalized, Omnichannel Document Generation – at Scale



Delivering a streamlined and orchestrated digital experience across touchpoints is highly complex and many organizations have difficulty managing and controlling the process. Challenges arise when organizations use discrete systems for each communication channel – systems that don't interact seamlessly with the others and store duplicate versions of customer data.

Doxim has specialized expertise and a flexible, resilient CCM platform that produces a variety of digital formats. Our platform unifies the different channels and maintains a single source of customer data – providing a single point of control and update. In addition, we transform customer data into 'Doxim standard XML', making it usable by any channel and adaptable to future channels. As new technology emerges, our 'future facing' platform can quickly incorporate new and innovative channels – for a modern customer experience that leads the way.

Security & Compliance



Our responsibility to protect our clients' sensitive information is of the utmost importance.

- Our efficient and streamlined operations are housed in state-of-the art, highly secure, Tier 3 data centers with built-in redundancy and high availability.
- Our secure processing environment is verified by 3rd parties, top ranked across all requirements, and exceeds all industry standards.
- Ongoing investments in our Governance, Risk and Compliance (GRC) enable us to track compliance and provide security awareness training with our employees.
- Based on location, we are compliant with AIPCA SOC2 Type 2, HIPAA, PCI, GDPR and WORM.

Partnering with Doxim

Our process and deep industry expertise ensure a smooth integration and transition. We are committed to delighting our clients with ongoing innovation to streamline engagement and constantly serve you better.

- Onboarding – As part of our client onboarding, we design a process tailored to your specific needs with data integrations to core systems and templates for each communication optimized for the given output channel (e.g. mobile first). Our experts leverage best practices in statement and document design to optimize readability, comprehension, and to motivate action. To increase wallet share, templates can include 'onserts zones' for targeted campaign graphics and personalized messaging, which your business users can manage and update.
- Managed Services – Our production experts manage the complexity of day-to-day document generation and delivery on behalf of our clients for optimal results.
- Self Service – The Doxim CCM Admin Portal (DAP) gives your business users control over managing / updating key aspects of every communication. Insights and reports are provided through an easy-to-use reporting dashboard.
- Business Continuity – To ensure business continuity in response to a business interruption (e.g. power outage, natural disaster, etc) outsource a portion of your production to Doxim today.
- All-In, Flat-Fee Pricing – Our monthly pricing model simplifies onboarding, contracting, and invoicing. It provides you with greater cash flow predictability, while giving you the flexibility to grow and adopt new features without impact to your budget.
- Client Services & Support – Our Client Services team have the expertise you need to extract maximum value from your Doxim investment. The team can provide assistance on the daily use, configuration, and functionality of all your Doxim products.
- Digital Transformation Consulting – Doxim's strategic consulting team can guide your digital transformation efforts. Leverage their expertise to assess your needs, develop strategies, chart your course, and improve each step of the CX.

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Doxim is the customer communications management and engagement technology leader serving highly regulated markets, including financial services, utilities and healthcare. We provide omnichannel communications and payment solutions that maximize customer engagement and revenue, while reducing costs. Our software and technology-enabled managed services address key digitization, operational efficiency, and customer experience challenges through a suite of plug-and-play, integrated, SaaS software and technology solutions. Learn more at www.doxim.com.

Contact Us

Contact us to learn more about Doxim's innovative approach to digital communications and to discuss your requirements.